



## So you're thinking about retirement. Here's what you need to know!

Retirement is a huge and exciting step in your career and we want to make sure it goes as smoothly as possible. The following list contains items you need to think about as you begin your exit from Weber State University. While we are sad to see you go, we are thrilled to see you enter this phase of new adventures and more importantly...relaxation!

Types of retirement:

- Early Retirement: This is a program available to employees with at least 15 years of full-time salaried service who are within 10 years of their Social Security Administration full retirement age.
- Regular Retirement: You qualify for retirement from Weber State University if you have at least ten years of service and are at least 55 years old.

**Contact your RETIREMENT PROVIDER** to meet with a retirement counselor from URS or TIAA. They are the experts when it comes to helping you understand the details of your retirement! We recommend that you apply for retirement with URS or TIAA three months prior to your retirement date.

- URS – Ask for a retirement counselor (800) 695-4877
- TIAA – Ask for a retirement counselor (866) 842-2907

\*\*URS has stipulations on when you can go back to work post-retirement. Please be sure to have a conversation with a URS retirement counselor about this if you plan on working post-retirement.)

### Contact MEDICARE

This is very important since enrolling in Medicare is time sensitive! You want to know how to enroll properly and how your retirement and Medicare work together. You also want to be aware of any special enrollment periods as they relate to your particular situation. Medicare and Social Security are under the same umbrella. Be sure to ask any social security questions you may have.

- [www.medicare.gov](http://www.medicare.gov) 1-800-Medicare
- U.S. Social Security Administration (877) 378-9081 or [ssa.gov](http://ssa.gov)

## Contact SUN LIFE INSURANCE

If you are interested in porting or converting your life insurance, you must do so within 30 days from your termination date.

Sun Life – (303) 929-0516 or (951) 310-5564

## Contact your DEPARTMENT

- Write a letter of intent to retire to your supervisor.
- Remind your supervisor to submit a separation ePAR to the Payroll office at least one month before your retirement date if possible. (Separation ePARs can be done earlier for retiring faculty.)
- You will receive an auto-generated email that will outline the exit process and procedures. Be sure to complete each item on that list.
- Contact the Benefits Coordinator (x7230) in the Human Resources office to schedule an exit appointment some time during the last week that you will be on campus. She will answer questions about your retirement process as well as your retiree fringe benefits.
- Please be sure to return all university property and your keys. If you have a P-Card, contact purchasing to reconcile it.

Fringe Benefits: As found in ppm 3-45 B

B. Emeritus faculty, retired non-emeritus faculty and retired staff (to be considered "retired" for purposes of these benefits, the retiree must at the time of retirement have been at least 55 years of age and have served in a full-time capacity for 10 years).

1. Regular I.D. card privileges including:

- a. Bookstore discount
- b. Use of physical education facilities
- c. Use of Union Building facilities requiring I.D. (movies, bowling, etc.)
- d. Discount on certain specified University-sponsored activities and events
- e. Borrowing privileges at the Library
- f. Complimentary parking privileges
- g. Tuition benefits as defined in PPM 3-42b

*Good luck and happy trails! We wish only the best for you. If you have any questions or concerns, please feel free to contact Bethany Rasmussen at: [bethanyrasmussen@weber.edu](mailto:bethanyrasmussen@weber.edu) or (801)-626-7230. I am happy to speak with you via a phone, email, virtual or in-person appointment!*